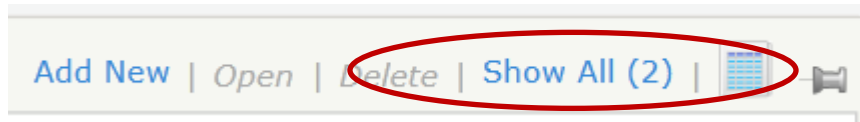


## DEACTIVATING A CONSUMER

Removing the check mark in the “Active” box shown in the consumer list or in the detail screen under “Basic Information” WILL NOT deactivate a consumer. The consumer must be deactivated using the Status Wizard. (This option is available in the Consumer Detail screen.)

1. Use Status Wizard when the Detail screen shows your facility as the only provider OR if the consumer has passed away.
2. Deactivate a consumer when the consumer has not been served for an extended period of time (six months or older). Choosing “Other” is a reason for deactivation. When using the “Other” reason, place a note in the note section of the detail screen providing the reason for deactivation, date, and name.
3. Once the Status Wizard has been completed, click on the yellow folder next to the Care Enrollment section in the detail screen to open the folder. Click on the “Status” box and select “Inactive”, then OK to close the folder.

IF a consumer record shows more than ONE provider in the Detail Screen, the Status Wizard CANNOT be used *unless the consumer is deceased*.



A provider can deactivate themselves by clicking on the yellow folder in the Provider box located on the right or left side of the Detail screen. Open the yellow folder and insert an “End Date”. The End Date should be either the last day of the month the consumer received a service OR the first day of the month following the last month of service. Then click OK.

IF a consumer close reason is DECEASED, deactivating a consumer with more than one provider is admissible using the Status Wizard. Deactivation date should be the last day of the month of last service OR the first day of the month AFTER the last date of service. Placing a courtesy note in the “Note” section of the Detail screen stating the consumer is deceased and indicating a date and name of the person deactivating the consumer, is appreciated.

More detail instructions on how to use the Status Wizard can be found in the “Application Support Resource” section of the Home-Production Site screen. The manual title is: Consumer Status Wizard Companion Guide.